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 Live Webinars

Strengthening Project Proposal Development

Overview of Project Design and
Project Management

13 May 2024

**EASTERN PARTNERSHIP
CIVIL SOCIETY FACILITY
PROJECT**

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Live Webinars

Strengthening Project Proposal Development

A series of webinars to guide CSOs in the Eastern Partnership on how to prepare proposals for EU funding



DATES

13, 15, 17 and 20 May 2024



TIME

13:00 - 14:00 CET (Brussels time)

- ✓ 13 May: Overview of Project Design and Project Management
- ✓ 15 May: People in Projects
- ✓ 17 May: Purpose and Objectives in Projects
- ✓ 20 May: Monitoring and Control in Projects

Trainer: Agustín Moya-Colorado

Senior Project Management Expert at
Helpdesk for EU grantees at EaP Civil Society Facility



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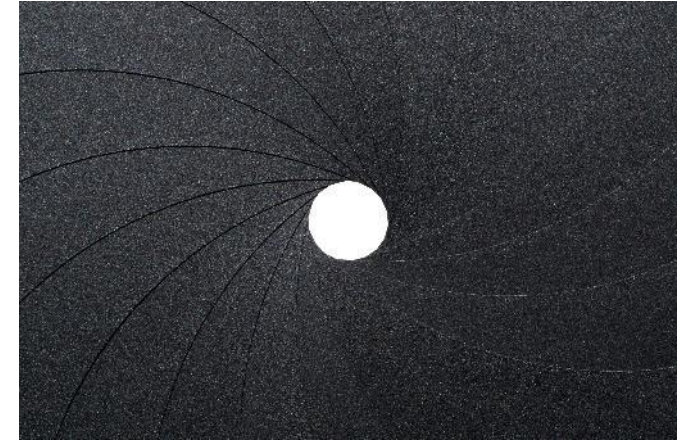
Agustín Moya Colorado

- Agricultural Engineer
- 25 years working experience in Project Management in the area of International Development Cooperation
- Working experience with NGO and with donor agencies (EC)
- Nicaragua, Guatemala, Namibia, Mozambique, Cyprus
- PM² certified
- Helpdesk for the EaP Civil Society facility:
 - grantees_helpdesk@eapcivilsociety.eu
- LinkedIn →



Proposed rules for the session

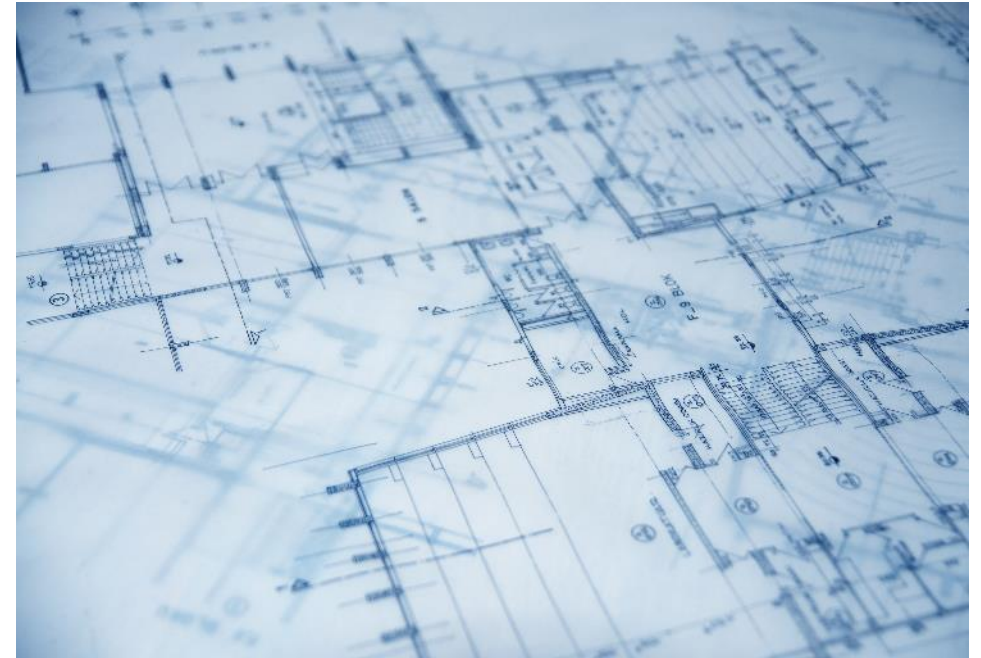
- We are using Zoom in Webinar Mode
- We are a large group:
 - Cameras and microphones are off by default
- Questions:
 - Please use the **Zoom Q&A section** for specific questions on the content of the webinar
 - These will be answered **at the end** of the session
 - Please use the **Zoom Chat section** to share your experience or comments.
 - We will not be able to answer questions posed in the chat.



Day 1 - Overview of Project Design and Project Management

13 May 2024

- Project Design:
 - Logical Framework Approach
 - Concept Notes
- Project Management:
 - Main components
 - Tools and Best Practices
- Questions and Answers





About Project Design

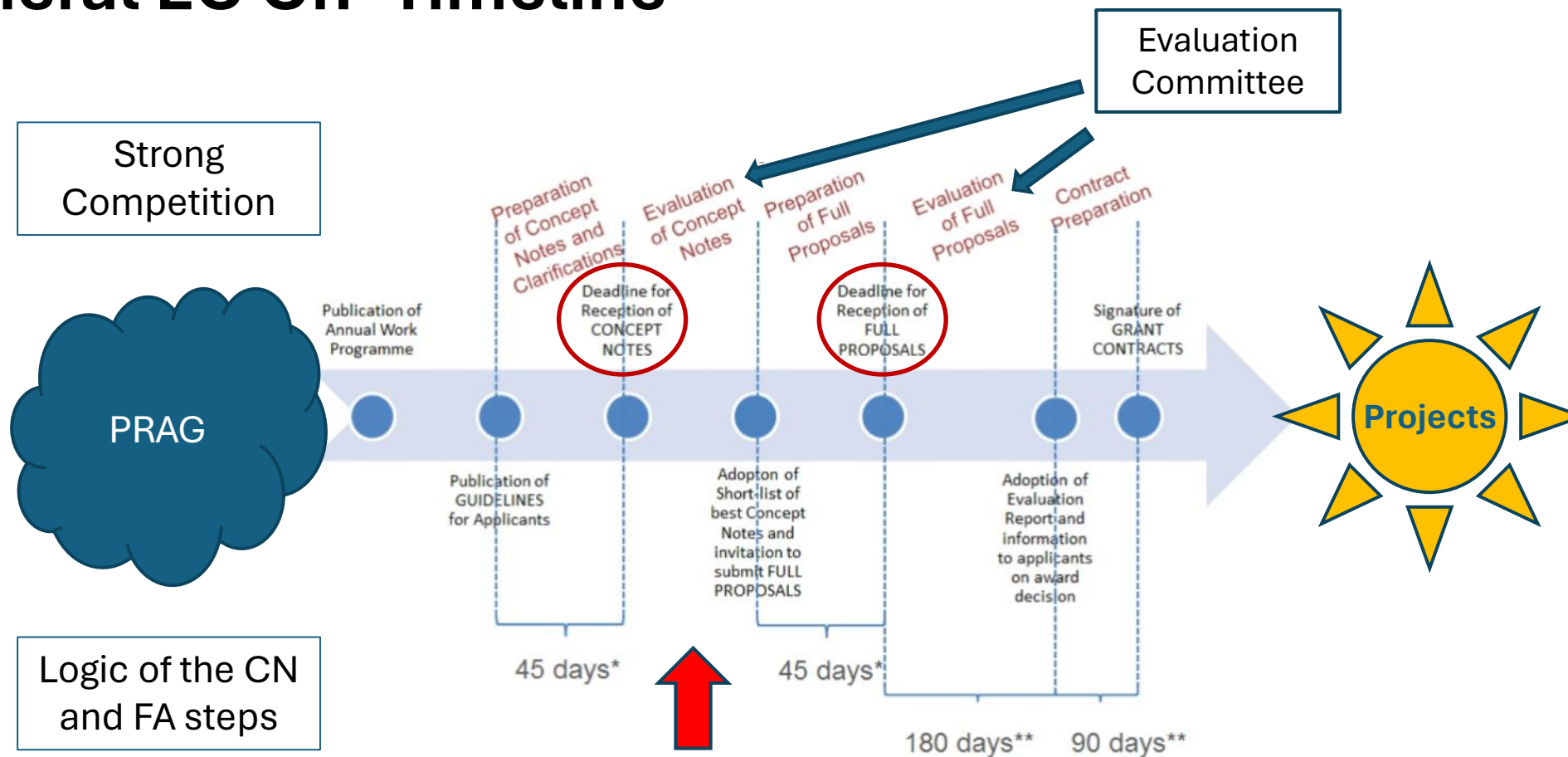
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Do you have experience with EU-funded projects?

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General EC CfP Timeline



*- These periods may be extended by the Contracting Authority, they may also be reduced but a derogation is needed in this case
 **- These periods do not apply in the case of complex actions or where a large number of proposals has been received

Figure adapted from PRAG

Checklist for your decision-making – Assess the CfP

- Eligibility of the applicant – Are we eligible for the call?
 - Could we be a contractor?
- Eligibility of the action
 - Do they fund what we do?
 - Do we do what they fund?
- Do we have the capacity?
 - Do we need partners?
- Is it worth it?
 - How much it could cost us? (Time, Money, Opportunity Cost)
 - How much would we gain? (Money, Experience, Status, Impact)
- Can we be competitive enough?
 - Money available – Estimate Chances
 - Assess the competitors
 - Can we score very high at CN and FA?
- Are the risks worth the investment? = SWOT Analysis



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What is Project Design in the context of EU-funded projects?

- A **structured, participatory and result-oriented process** that aims to develop the most **appropriate and feasible** intervention **strategy** to address a development **problem**.
- The project design process should be informed by a **thorough analysis of the problem** to be addressed, as well as of the needs, preferences and priorities of the **target groups** of the intervention.
- It is a **key moment** in the project cycle and determines the **soundness** of a project proposal.
 - **When does it happen? – At Concept Note Stage**
 - **How do we do it? – with the Logical Framework Approach**

Programming skills self-assessment matrix

	A1	A2	B1	B2	C1	C2
Writing skills	Can write a simple letter or form in English.	Can write a simple letter or form in English, using a template.	Can write a simple letter or form in English, using a template, and can write a short report or proposal.	Can write a simple letter or form in English, using a template, and can write a short report or proposal, and can write a letter of invitation or request.	Can write a simple letter or form in English, using a template, and can write a short report or proposal, and can write a letter of invitation or request, and can write a letter of appreciation or thanks.	Can write a simple letter or form in English, using a template, and can write a short report or proposal, and can write a letter of invitation or request, and can write a letter of appreciation or thanks, and can write a letter of apology or excuse.
Reading skills	Can read and understand simple text in English.	Can read and understand simple text in English, and can identify the main idea.	Can read and understand simple text in English, and can identify the main idea, and can identify the main points.	Can read and understand simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments.	Can read and understand simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments, and can identify the main conclusions.	Can read and understand simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments, and can identify the main conclusions, and can identify the main recommendations.
Speaking skills	Can speak in English.	Can speak in English, and can understand simple instructions.	Can speak in English, and can understand simple instructions, and can understand simple questions.	Can speak in English, and can understand simple instructions, and can understand simple questions, and can understand simple requests.	Can speak in English, and can understand simple instructions, and can understand simple questions, and can understand simple requests, and can understand simple offers.	Can speak in English, and can understand simple instructions, and can understand simple questions, and can understand simple requests, and can understand simple offers, and can understand simple suggestions.
Listening skills	Can listen to and understand simple speech in English.	Can listen to and understand simple speech in English, and can identify the main idea.	Can listen to and understand simple speech in English, and can identify the main idea, and can identify the main points.	Can listen to and understand simple speech in English, and can identify the main idea, and can identify the main points, and can identify the main arguments.	Can listen to and understand simple speech in English, and can identify the main idea, and can identify the main points, and can identify the main arguments, and can identify the main conclusions.	Can listen to and understand simple speech in English, and can identify the main idea, and can identify the main points, and can identify the main arguments, and can identify the main conclusions, and can identify the main recommendations.
Understanding	Can understand simple text in English.	Can understand simple text in English, and can identify the main idea.	Can understand simple text in English, and can identify the main idea, and can identify the main points.	Can understand simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments.	Can understand simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments, and can identify the main conclusions.	Can understand simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments, and can identify the main conclusions, and can identify the main recommendations.
Using skills	Can use simple text in English.	Can use simple text in English, and can identify the main idea.	Can use simple text in English, and can identify the main idea, and can identify the main points.	Can use simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments.	Can use simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments, and can identify the main conclusions.	Can use simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments, and can identify the main conclusions, and can identify the main recommendations.
Designing skills	Can design simple text in English.	Can design simple text in English, and can identify the main idea.	Can design simple text in English, and can identify the main idea, and can identify the main points.	Can design simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments.	Can design simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments, and can identify the main conclusions.	Can design simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments, and can identify the main conclusions, and can identify the main recommendations.
Improving skills	Can improve simple text in English.	Can improve simple text in English, and can identify the main idea.	Can improve simple text in English, and can identify the main idea, and can identify the main points.	Can improve simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments.	Can improve simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments, and can identify the main conclusions.	Can improve simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments, and can identify the main conclusions, and can identify the main recommendations.
Monitoring skills	Can monitor simple text in English.	Can monitor simple text in English, and can identify the main idea.	Can monitor simple text in English, and can identify the main idea, and can identify the main points.	Can monitor simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments.	Can monitor simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments, and can identify the main conclusions.	Can monitor simple text in English, and can identify the main idea, and can identify the main points, and can identify the main arguments, and can identify the main conclusions, and can identify the main recommendations.

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CN Evaluation Grid – Design

Section	Max. Score
2. Design of the action	30
2.1. How coherent is the overall design of the action? Does the proposal indicate the expected results to be achieved by the action? Does the intervention logic explain the rationale to achieve the expected results?	5x2**
2.2. Does the design reflect a robust analysis of the problems involved, and the capacities of the relevant stakeholders?	5
2.3. Does the design take into account external factors (risks and assumptions)?	5
2.4. Are the activities feasible and consistent in relation to the expected results (including timeframe)? Are results (output, outcome and impact) realistic ?	5
2.5. To which extent does the proposal integrate relevant cross-cutting elements such as environmental/climate change issues, promotion of gender equality and equal opportunities, needs of disabled people, rights of minorities and rights of indigenous peoples, youth, combating HIV/AIDS (if there is a strong prevalence in the target country/region)?	5

** : this score is multiplied by 2 because of its importance

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**How do you do a jigsaw puzzle?
What do you do first?**

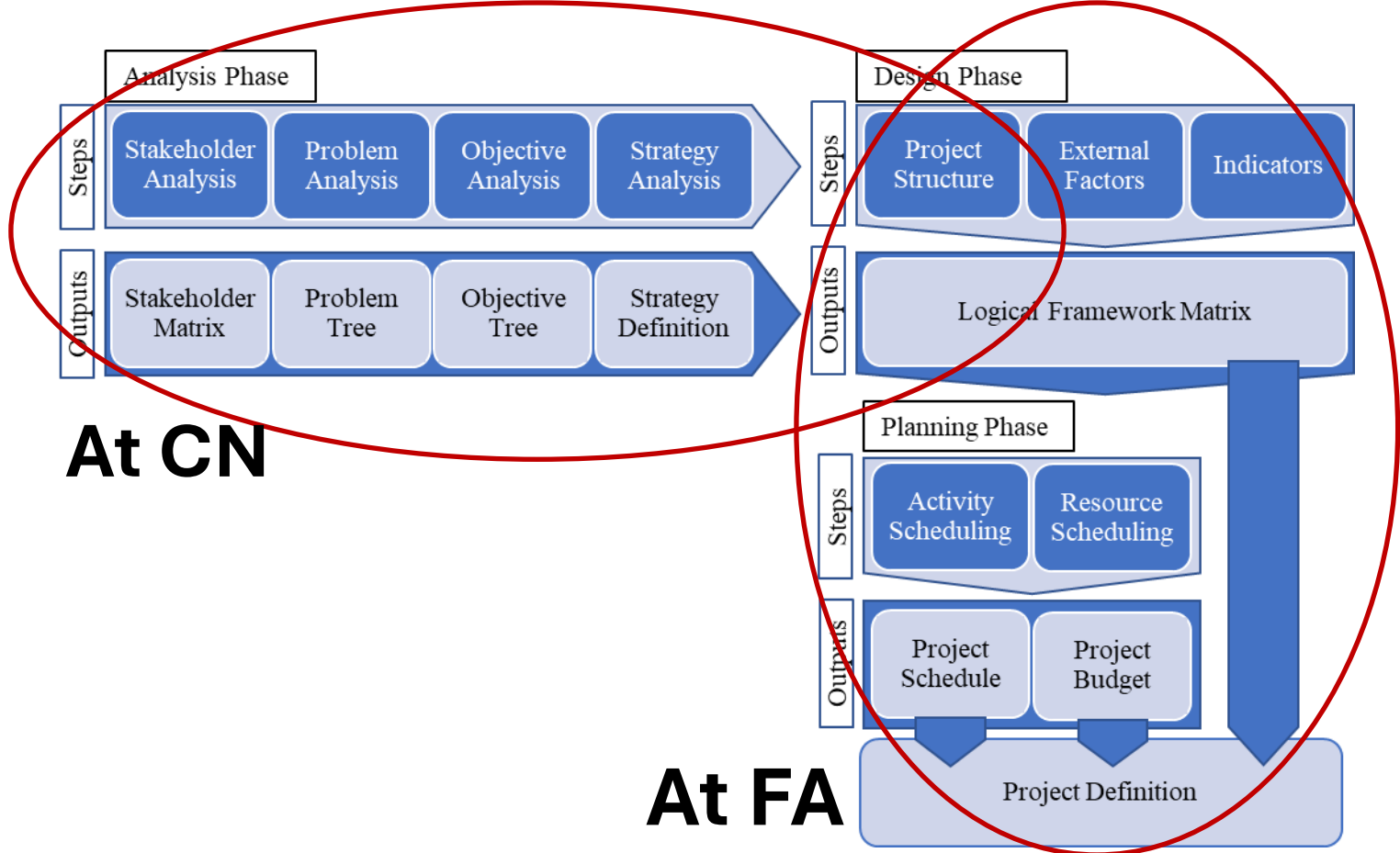


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The Logical Framework Approach (LFA) and the Logical Framework Matrix (LFM)

LFA ≠ LFM
Process ≠ Document

- LFA**
- Process
 - Structured
 - Participative
 - Results-oriented
 - Not activity-oriented
 - Intervention logic /rationale



Logframe At CN

Relevance and design (CN evaluation grid questions) are essentially here!

Relevance ≈ Alignment
Design ≈ Coherence

	Results-chain□	Indicator□	Baseline¶ (value-&-reference-year)□	Target¶ (value-&-reference-year)□	Current-value*¶ (reference-year)¶ (*to-be-included-in-interim-and-final-reports)□	Source-and-mean-of-verification□	Assumptions□
Impact (Overall objective)	The broader, long-term change to which the action contributes at country, regional or sector level, in the political, social, economic and environmental global context which will stem from interventions of all relevant actors and stakeholders. □	Quantitative and/or qualitative variable that provides a simple and reliable mean to measure the achievement of the corresponding result.¶ To be presented when relevant, disaggregated by sex, age, urban/rural, disability, etc. □	The value of the indicator(s) prior to the intervention against which progress can be assessed or comparisons made.¶ (Ideally, to be drawn from the partner's strategy) □	The intended final value of the indicator(s).¶ (Ideally, to be drawn from the partner's strategy) □	The latest available value of the indicator(s) at the time of reporting¶ (* to be updated in interim and final reports) □	Ideally to be drawn from the partner's strategy. □	Not applicable □
Outcome(s) (Specific objective(s)) □	The main medium-term effect of the intervention focusing on behavioural and institutional changes resulting from the intervention¶ (It is good practice to have one specific objective only, however for large Actions, other short term outcomes can be included here) □	(see definition above) ¶ □	The value of the indicator(s) prior to the intervention against which progress can be assessed or comparisons made. □	The intended final value of the indicator(s). □	(same as above) ¶ □	Sources of information and methods used to collect and report (including who and when/how frequently). □	Factors outside project management's control that may influence on the impact outcome(s). □
*Other Outcomes (*where relevant) □	Where relevant other short-term effect(s) of the intervention focusing on behavioural and institutional changes resulting from the intervention (e.g. intermediate outcomes can be accommodated here) □	(same as above) ¶ □	(same as above) ¶ □	(same as above) ¶ □	(same as above) ¶ □	(same as above) ¶ □	Factors outside project management's control that may impact on the SO/other outcomes linkage. □
Outputs □	The direct/tangible products (infrastructure, goods and services) delivered/generated by the intervention.¶ (*Outputs should in principle be linked to corresponding outcomes through clear numbering) □	(same as above) ¶ □	(same as above) ¶ □	(same as above) ¶ □	(same as above) ¶ □	(same as above) ¶ □	Factors outside project management's control that may influence on the other outcome(s)/output linkage. □

Activity Matrix¶

What are the key activities to be carried out to produce the intended outputs? ¶ ¶ (*activities should in principle be linked to corresponding output(s) through clear numbering) □	Means ¶ What are the political, technical, financial, human and material resources required to implement these activities, e.g. staff, equipment, supplies, operational facilities, etc. ¶ Costs ¶ What are the action costs? How are they classified? (Breakdown in the Budget for the Action) □	Assumptions ¶ Factors outside project management's control that may impact on the activities/output linkage. □
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At FA

At FP you will need to complete the process and respond to the questions in the FA Grid

	Results-chain [□]	Indicator [□]	Baseline [¶] (value-&-reference-year) [□]	Target [¶] (value-&-reference-year) [□]	Current-value [¶] (reference-year) [¶] (*to-be-included-in-interim-and-final-reports) [□]	Source-and-mean-of-verification [□]	Assumptions [□]
Impact (Overall objective)	The broader, long-term change to which the action contributes at country, regional or sector level, in the political, social, economic and environmental global context which will stem from interventions of all relevant actors and stakeholders. [□]	Quantitative and/or qualitative variable that provides a simple and reliable mean to measure the achievement of the corresponding result. [¶] To be presented when relevant, disaggregated by sex, age, urban/rural, disability, etc. [□]	The value of the indicator(s) prior to the intervention against which progress can be assessed or comparisons made. [¶] (Ideally, to be drawn from the partner's strategy) [□]	The intended final value of the indicator(s). [¶] (Ideally, to be drawn from the partner's strategy) [□]	The latest available value of the indicator(s) at the time of reporting [¶] (* to be updated in interim and final reports) [□]	Ideally to be drawn from the partner's strategy. [□]	Not applicable [□]
Outcome(s) (Specific objective(s))[□]	The main medium-term effect of the intervention focusing on behavioural and institutional changes resulting from the intervention [¶] (It is good practice to have one specific objective only, however for large Actions, other short term outcomes can be included here) [□]	(see definition above) [¶] [□]	The value of the indicator(s) prior to the intervention against which progress can be assessed or comparisons made. [□]	The intended final value of the indicator(s). [□]	(same as above) [¶] [□]	Sources of information and methods used to collect and report (including who and when/how frequently). [□]	Factors outside project management's control that may influence on the impact outcome(s). [□]
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Outputs[□]	The direct/tangible products (infrastructure, goods and services) delivered/generated by the intervention [¶] (*Outputs should in principle be linked to corresponding outcomes through clear numbering) [□]	(same as above) [¶] [□]	(same as above) [¶] [□]	(same as above) [¶] [□]	(same as above) [¶] [□]	(same as above) [¶] [□]	Factors outside project management's control that may influence on the other outcome(s)/output linkage. [□]

Activity Matrix[¶]

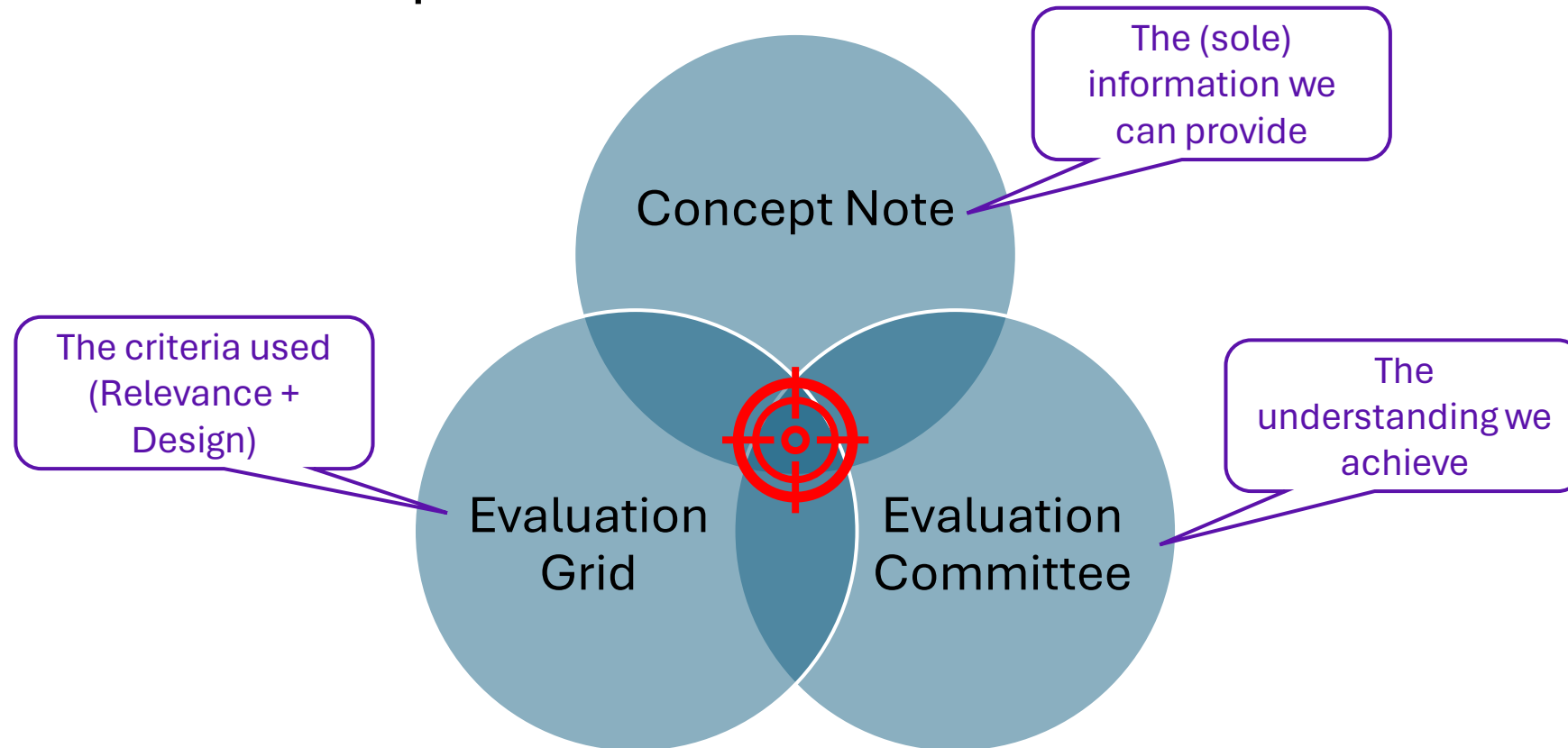
What are the key activities to be carried out to produce the intended outputs? [¶] (*activities should in principle be linked to corresponding output(s) through clear numbering) [□]	Means[¶] What are the political, technical, financial, human and material resources required to implement these activities, e.g. staff, equipment, supplies, operational facilities, etc. [¶]	Assumptions[¶] Factors outside project management's control that may impact on the activities/outputs linkage. [□]
	Costs[¶] What are the action costs? How are they classified? (Breakdown in the Budget for the Action) [□]	

Evaluation of the CNs

- Max. 50 points - 30 is the quality threshold
- **4 Sections for Relevance** (5 points each) = 20 points
- **5 Sections for Design** (5 points each with Section 2.1 with double points – Coherence, results, intervention logic) = 30 points
- A **score of 5 (very good)** will only be allocated if the proposal specifically addresses more than the required minimum number of priorities as indicated in Section 1.2 (objectives of the programme) of these guidelines.
- CNs above the 30 threshold will be **ranked by score**.
- The highest scoring applications will be pre-selected until **the limit of at least 200%** of the available budget for the CfP is reached (for each lot);
- Lead applicants receive a letter indicating the reference number of their application and the respective **results**.
- The pre-selected lead applicants will subsequently be **invited** to submit full applications.

So, what do we do?

- We need to maximize the **score** – the points we receive
- Where are the points?



CN Tips – Plan and LFA

Necessary for your Concept Note preparation:

- **Make a plan** for your CN preparation. Consider all the administrative requirements and the uploading time (PROSPECT) – **never the last day!!**
- Undertake a **Stakeholder mapping** exercise, defining your **target groups and final beneficiaries**. Clarify how they will participate and the role they play.
- **Analise the problems** - collect information as much as possible – **your information must be accurate and credible**.
- Identify how your **proposed solutions** (outputs and activities) are aligned with the outcomes, objectives and priorities identified in the call.
- Ensure **alignment** with the objectives and priorities of the call
- **Dialogue and work closely** with your **partners**.



CN Tips – Think of Change

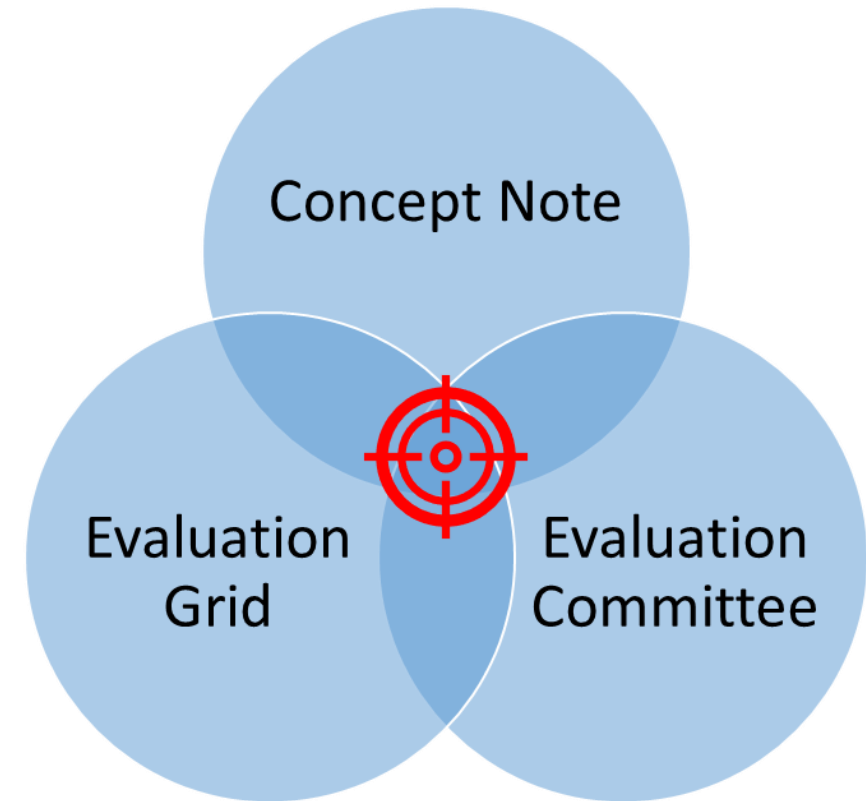
Think about the change you want to produce by the intervention:

- **What** you want to change at:
 - ✓ **Policy** (e.g. new policies, laws, standards, political and institutional framework)
 - ✓ **Practice** (e.g. delivery of new services and systems)
 - ✓ **Behaviour** (e.g. improved capacities, engagement and actions)
- **Who will be** affected by the change?
- **Who will** benefit from the intervention?
- **How** will the change happen?
- **What** methods and approaches do you intend to use?
- What **added value** elements have you incorporated?



Drafting tips

- ✓ **Abide** to all rules
- ✓ **Define and prioritize** your messages
- ✓ Be **clear and specific**
- ✓ Write with **short sentences**
- ✓ Make sure you provide **answers to the questions in the Evaluation Grid**
- ✓ Think of your **audience – facilitate their work**
- ✓ Have **double-eyes** reviewing
 - ✓ Content
 - ✓ Understandability
 - ✓ Spelling

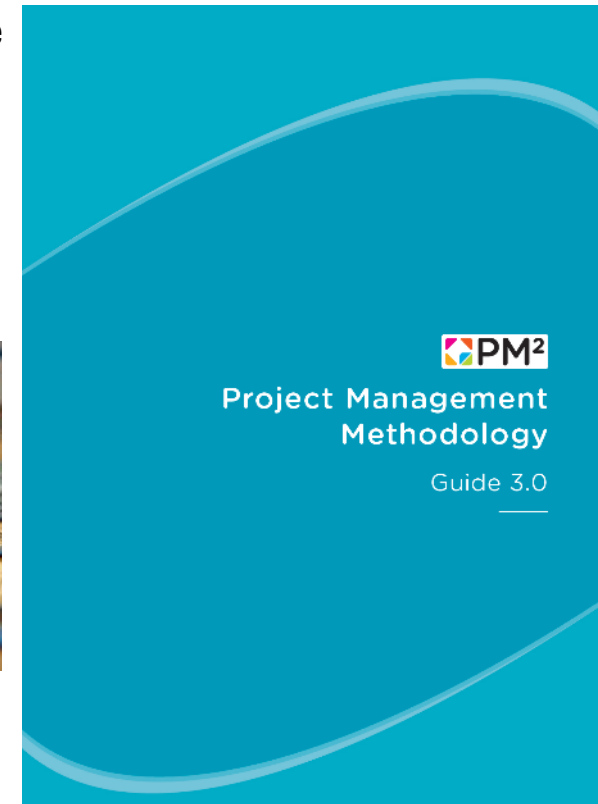




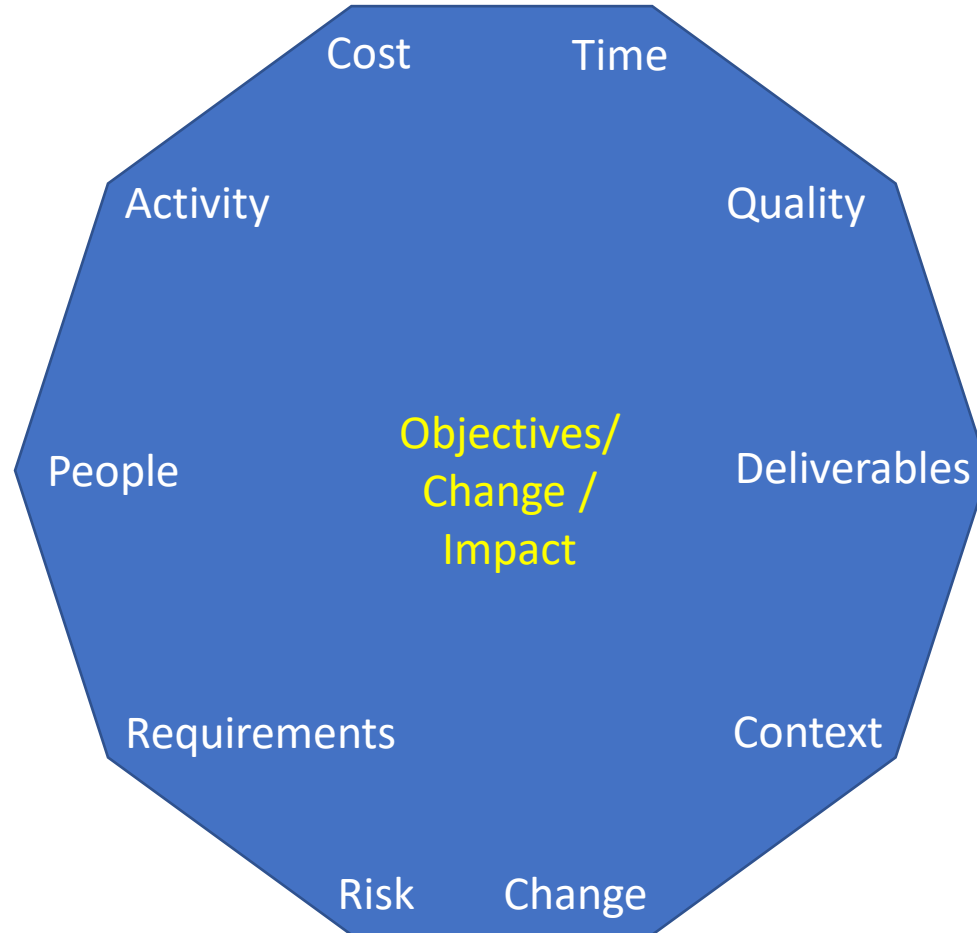
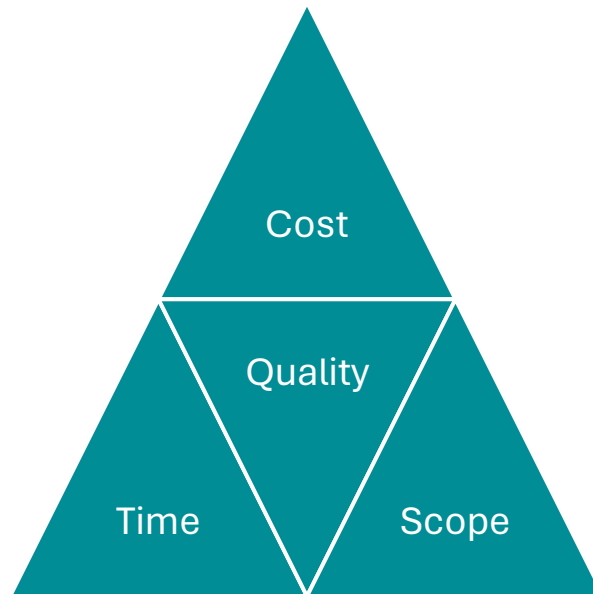
About Project Management

What is Project Management in EU-funded projects?


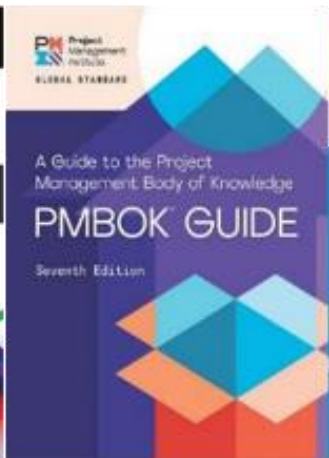



- Structured **process** of planning, executing, monitoring, and closing projects to achieve specific goals and meet specific success criteria at a specified time.
- Key aspects of project management in EU-funded projects include:
 - To achieve project **goals** within the given **constraints** such as budget, time, and scope
 - Compliance and Adherence to Regulations
 - Stakeholder and Consortium Management
 - Financial Management
 - Risk Management
 - Reporting and Documentation
 - Quality Assurance.
- **When** does it happen? – Throughout the whole project **Lifecycle**
- **How** do we do it? – with a **Project Management Methodology**



Projects are complex – multidimensional endeavours

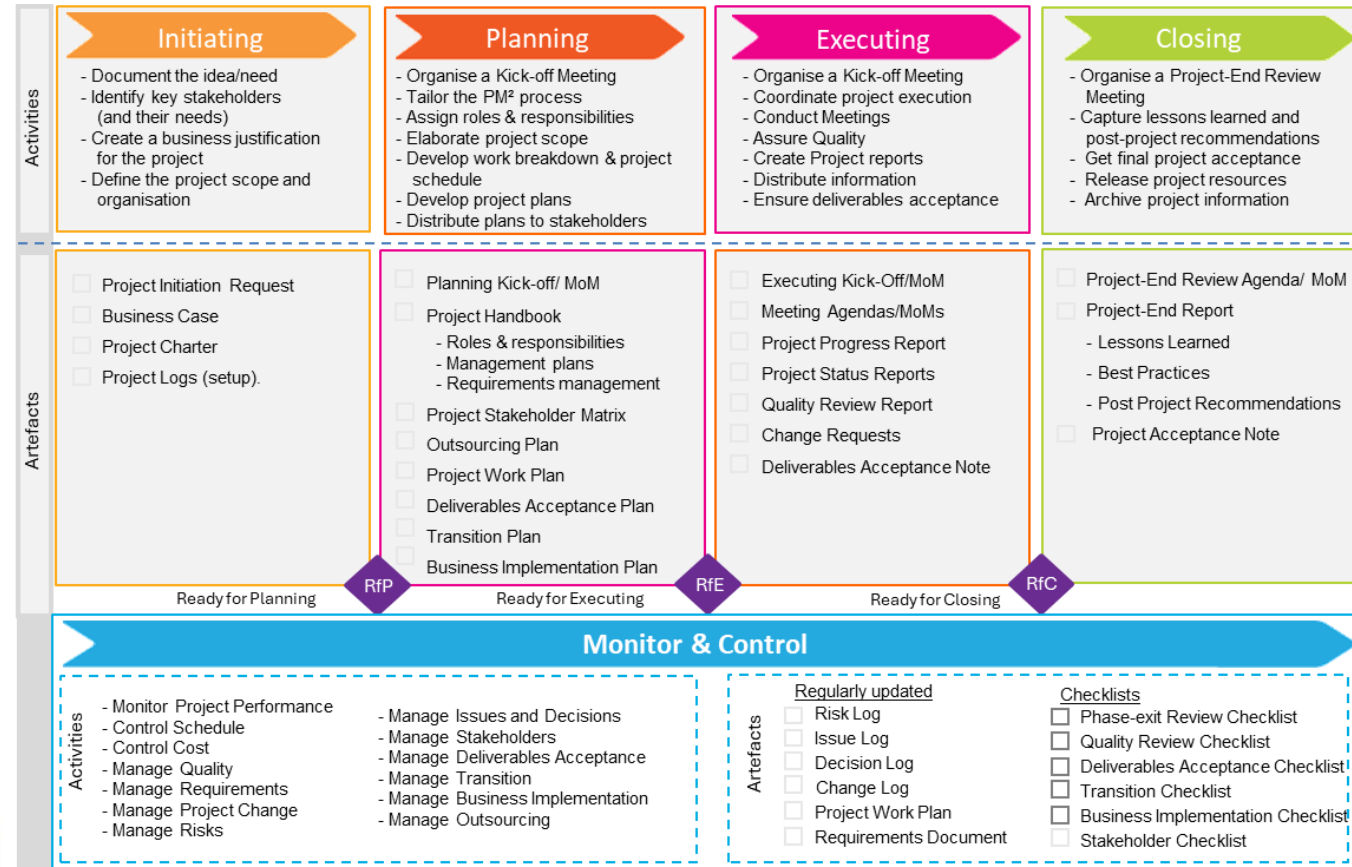
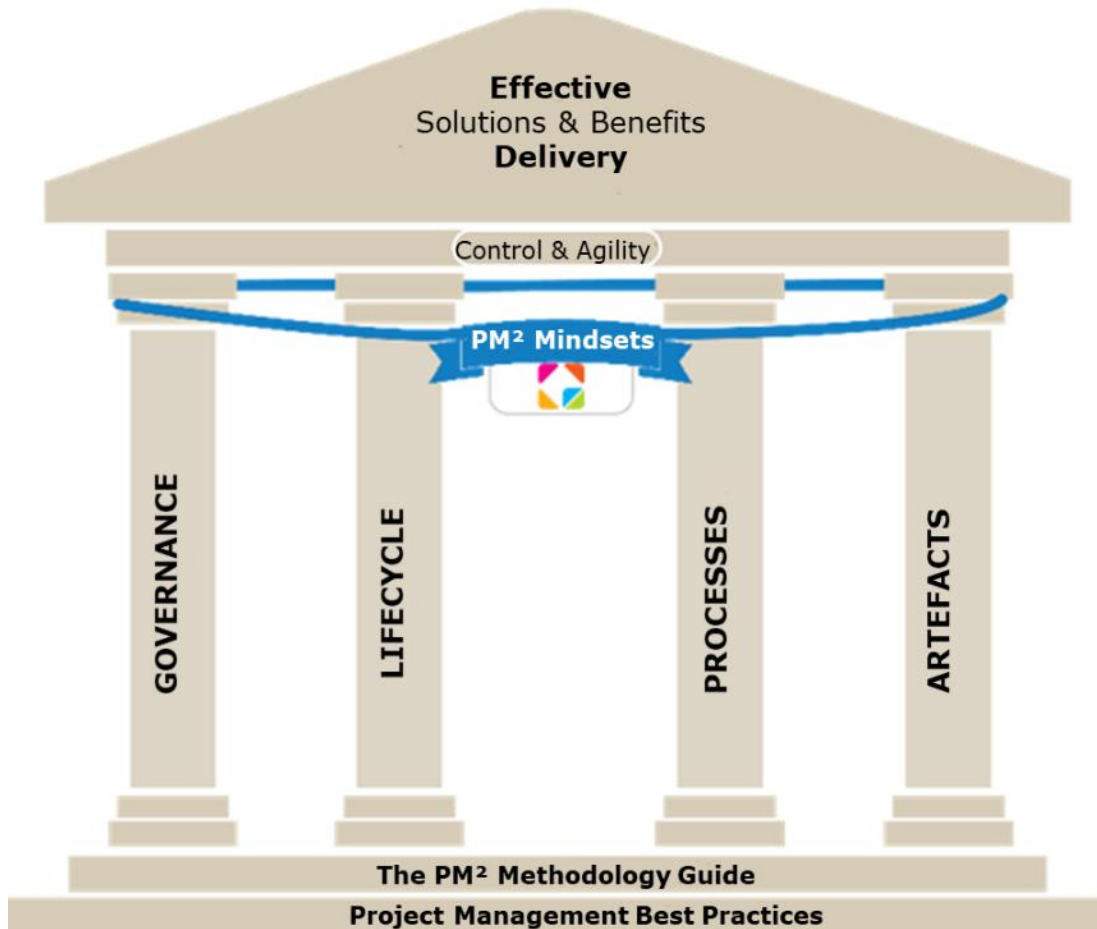


Project Management: A professional and standardized activity

				
IPMA	PMI	AXELOS	ISO	PM²
1965	1969	1990	2012	2016
Switzerland	USA	UK	Int.	EC
Competencies	Processes	Products	Guidelines	Usability

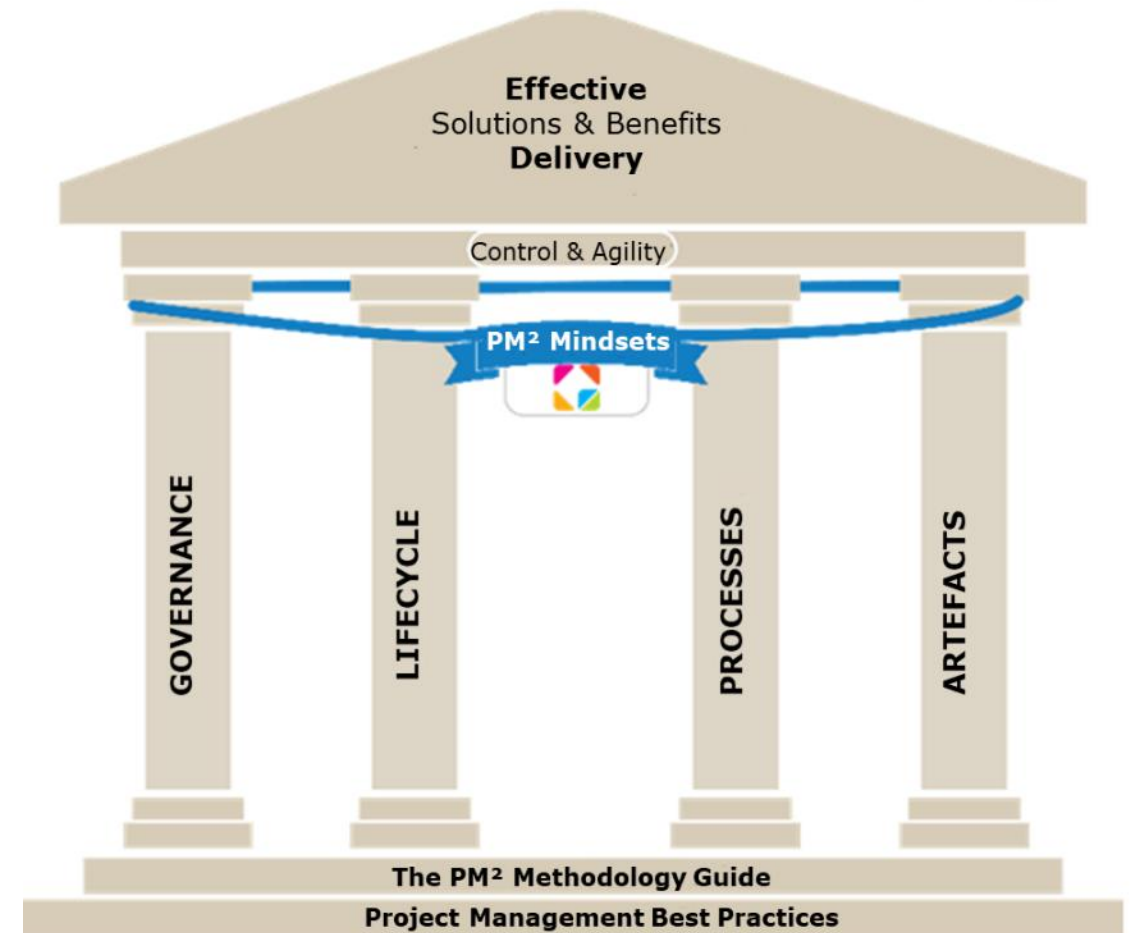
International Standards

The pillars of PM²



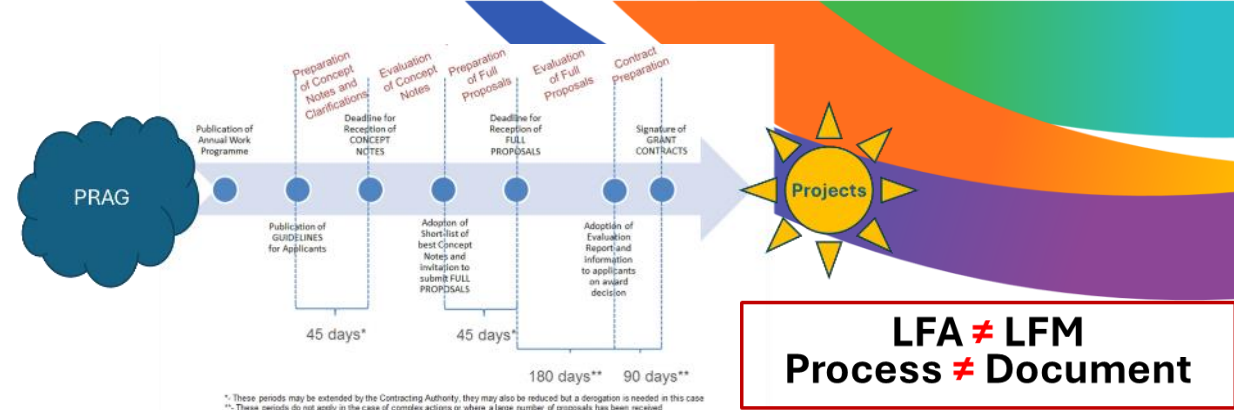
More on PM²

- At the **EaP eLearning Hub** you can find a webinar that goes into more detail on PM²:



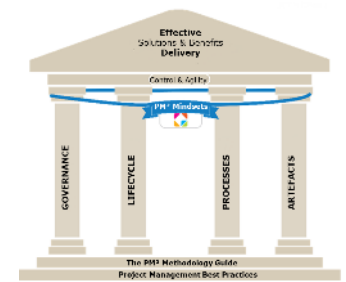
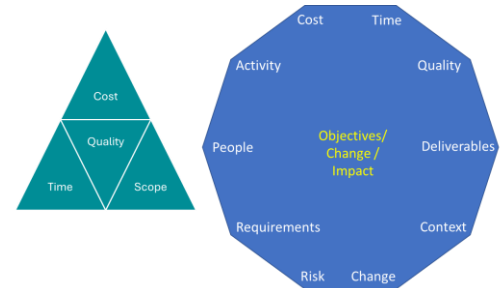
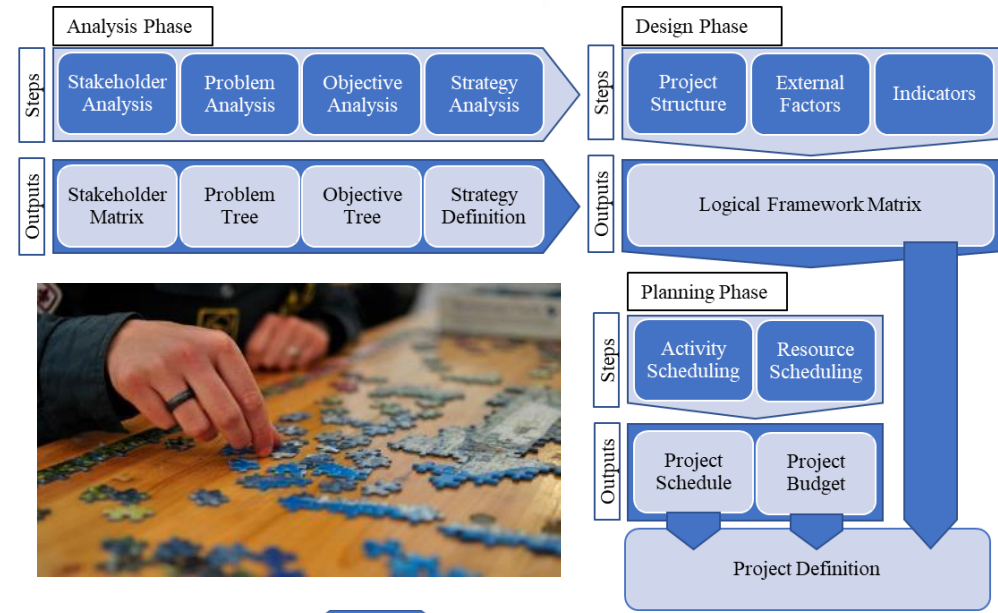
Wrap-up

- EU-Funded projects are complex and competitive, generally organized in **two steps: CN and FA**
- **Project Design** is fundamental, and it is supported by the **LFA**, which is different from the LFM; and it is **assessed at CN stage** together with **Relevance**.
- Make sure you cover all steps in the **Analysis** to answer all the questions in the evaluation grids.
- **At FA stage** you will complete the **planning** of your project
- **Project Management** is supported by Project Management Methodologies, such as **PM²**, that allow you to integrate all the necessary dimensions in your project.



LFA ≠ LFM
Process ≠ Document

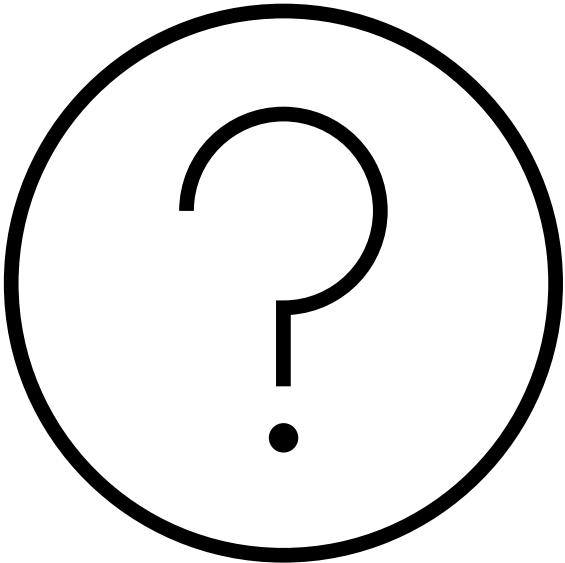
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** These periods do not apply in the case of complex actions or where a large number of proposals has been received.





Thank you very much for your kind attention

Questions and answers



grantees_helpdesk@eapcivilsociety.eu

slido



Has this session been useful to you?

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